

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name and Address):   ATTORNEY FOR (Name): <b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME: ESTATE OF (NAME):  <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> DECEDENT         <input type="checkbox"/> CONSERVATEE         <input type="checkbox"/> MINOR       </div>	TELEPHONE NO.:	<b>FOR COURT USE ONLY</b>
<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> <b>INVENTORY AND APPRAISEMENT</b> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> <b>Complete</b>  <input type="checkbox"/> <b>Partial No.:</b>  <input type="checkbox"/> <b>Reappraisal for Sale</b> </div> <div style="width: 45%;"> <input type="checkbox"/> <b>Final</b>  <input type="checkbox"/> <b>Supplemental</b> </div> </div>		CASE NUMBER:   Date of Death of Decedent or of Appointment of Guardian or Conservator:

#### APPRAISALS

- |   |           |
|---|-----------|
| 1. Total appraisal by representative (attachment 1) | \$        |
| 2. Total appraisal by referee (attachment 2)        | \$        |
| <b>TOTAL:</b>                                       | <b>\$</b> |

#### DECLARATION OF REPRESENTATIVE

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of  
☐ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in attachment 1.
4. ☐ No probate referee is required ☐ by order of the court dated (*specify*):

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME) (Include title if corporate officer)	(SIGNATURE OF PERSONAL REPRESENTATIVE)
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#### STATEMENT REGARDING BOND

*(Complete if required by local court rule)*

5. ☐ Bond is waived.
6. ☐ Sole personal representative is a corporate fiduciary.
7. ☐ Bond filed in the amount of: \$ ☐ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ have been filed with the court for deposits in a blocked account  
 at (*specify institution and location*):

Date:

(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

#### DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is
- Statutory commission: \$
- Expenses (*specify*): \$
- TOTAL: \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)	(SIGNATURE OF REFEREE)
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(Instructions on reverse)

## INSTRUCTIONS

See Probate Code, §§ 604, 608, 609, 611, 2610-2616 for additional instructions.

If required in a decedent's estate proceeding by local court rule, furnish an extra copy for the clerk to transmit to the assessor (Probate Code, § 600).

See Probate Code, §§ 600-602 for items to be included.

If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento (Probate Code, § 2611).

The representative shall list on attachment 1 and appraise as of the date of death of the decedent or date of appointment of the guardian or conservator at fair market value moneys, currency, cash items, bank accounts and amounts on deposit with any financial institution (as defined in Probate Code, § 605), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.

The representative shall list on attachment 2 all other assets of the estate which shall be appraised by the referee.

If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of attachments 1 and 2.

Each attachment should conform to the format approved by the Judicial Council (see form Inventory and Appraisement (Attachment) (DE-161, GC-041) and Cal. Rules of Court, rule 201).